

## Enrollment: School Choice

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# Agenda

1. Getting Started
2. School Choice Workspace
3. Running Lottery
4. Q & A
5. Resources





# Getting Started

# Getting Started:

## Prep for Lottery – *Working with PowerSchool Support*



### Project kickoff



### Review lottery application

Look for things that need to be changed  
Consider how changes will affect how lottery is run



### Form updates



### Customer sign-off



### Proceed to lottery configuration/testing



# School Choice (Lottery)

# School Choice Workflow



# Points to Consider



Records must be **Approved** in Submission Workspace



Process Records in **Test Mode**



Student Data is **Obfuscated**



**Required** to provide reason for a Move



**Audit Log** tracks actions taken with records

# Import Records to School Choice Workspace

## 1. Navigate to the **School Choice Workspace** tab

Submission Workspace | **School Choice Workspace**

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Select a... View: **Approved** ▾ | Filter: *None* ▾ | Tag: *None* ▾

**Tasks** ▾ | 1 Found | Page 1 of 1 | ◀ ▶

	Application ID	First Name	Last Name	DateOfBirth	Multiple Births	Employee Verified	Sibling Verified	Economic Disadvantage Verified	Zoned School Verified	Grade	Primary School	Secondary School	Tertiary School	Submitted	Tags	Email History
<input type="checkbox"/>	27081943	test	test	01/01/2001	Yes					5	Excel	Achieve	Inspire	10/17/2018		



# Import Records to School Choice Workspace

## 2. Navigate to Students, Select **Import**

New and Improved Training Template (2017-2018) ?

Submission Workspace School Choice Workspace

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

### Lottery Summary

This is a summary of the current state of school choice lottery assignments.

Total Available Seats: **218**  
Total Submissions Imported: **0**  
Total Students Seated: **0**  
Total Students Waitlisted: **0**  
Total Seat Assignments: **0**  
Total Waitlist Assignments: **0**

### Students

There are **1** submission records eligible for import into the school choice workspace | **Import**

All (0) | Not Processed (0) | Processed (0)

### School

No items are selected.

#### Process Records

Process Records

#### Audit Log

View Audit Log

#### Communications

Manage Communication Templates

#### Seated List Reports

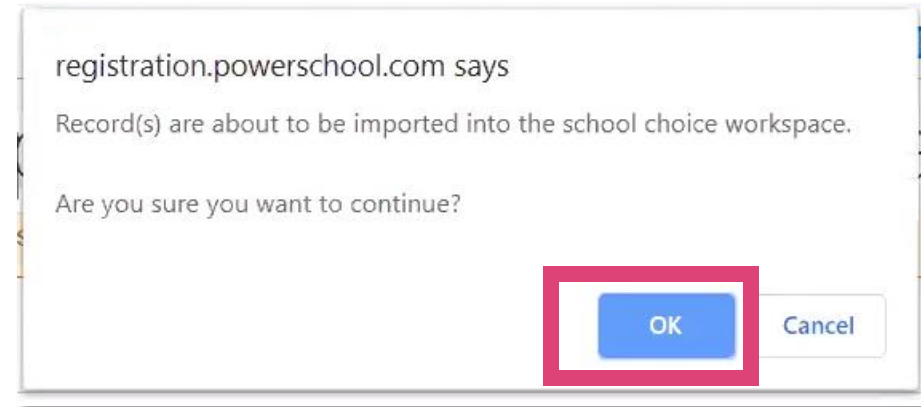
Download Seated List Reports  
Download Seated List Summary Report

#### Waitlist Reports

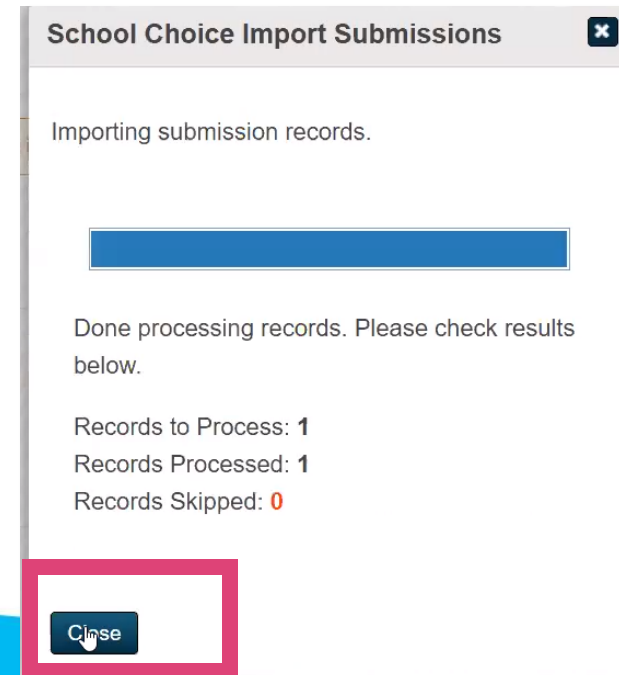
Download Waitlist Reports

# Import Records to School Choice Workspace

3. Prompted to confirm Import, **OK**



4. Records will Process, **Close**



# Import Records to School Choice Workspace

## 5. Students are now imported but **Not Processed**

Students		
All (2)	Not Processed (2)	Processed (0)

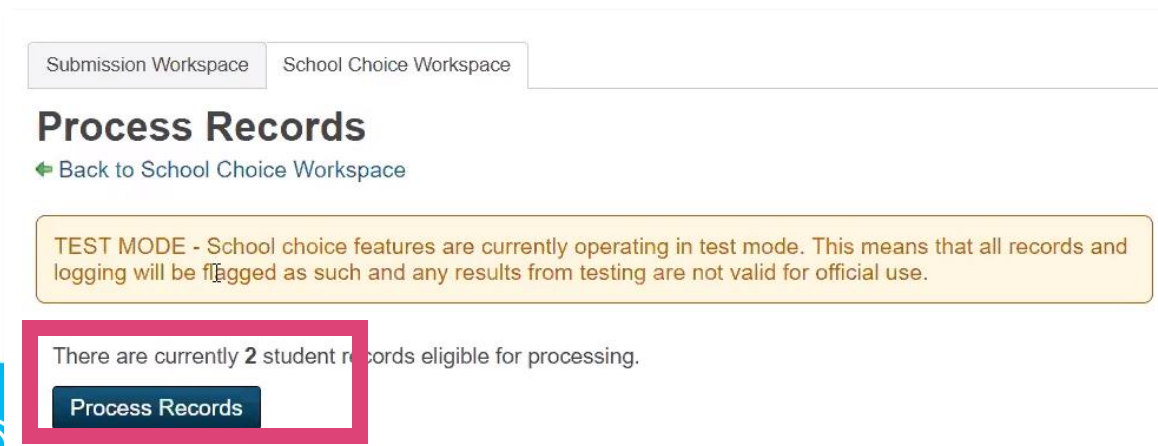
# Process Records in School Choice Workspace

## 1. Select Process Records



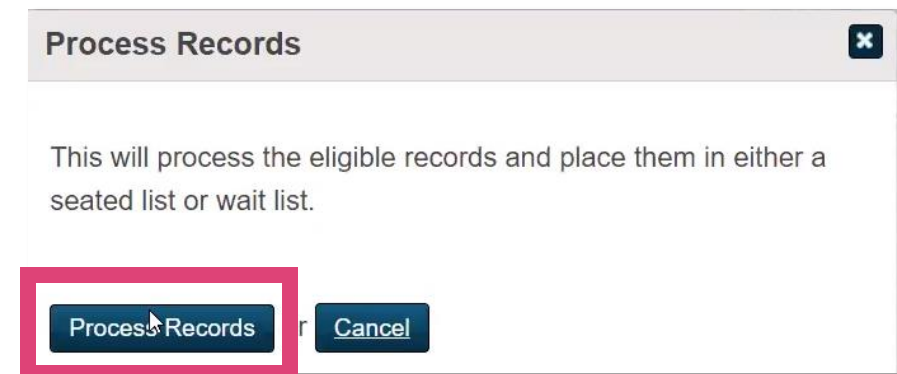
The screenshot shows the 'School Choice Workspace' tab selected. A yellow warning box states: 'TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.' Below this, the 'Lottery Summary' section is visible. On the right, a 'Process Records' button is highlighted with a red rectangular box.

## 2. Select Process Records



The screenshot shows the 'Process Records' dialog box. It includes a 'Back to School Choice Workspace' link and the same yellow test mode warning. Below the warning, a message states: 'There are currently 2 student records eligible for processing.' A 'Process Records' button is highlighted with a red rectangular box.

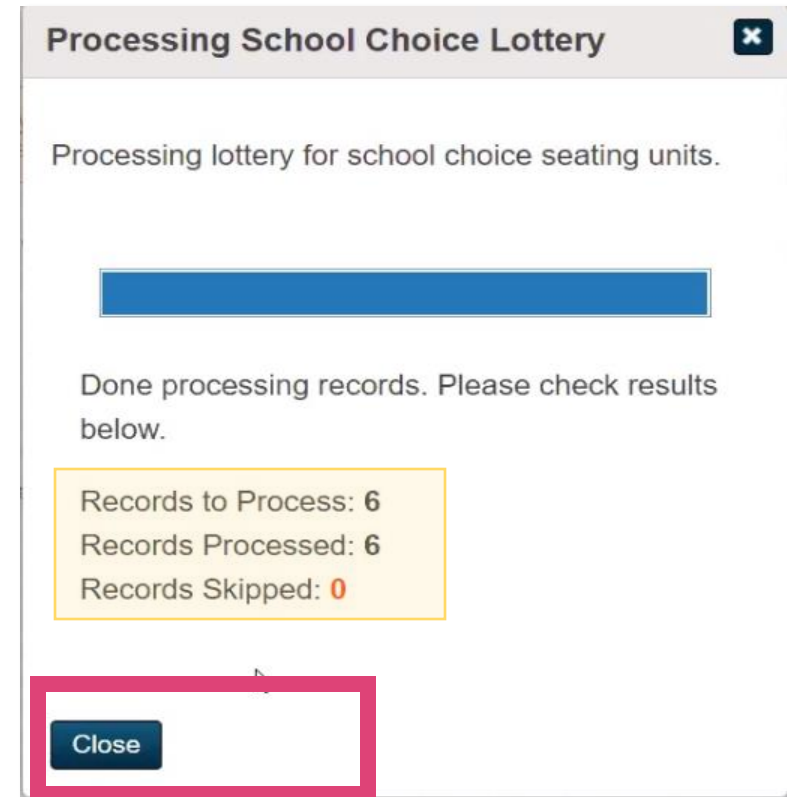
## 3. Select Process Records



The screenshot shows the 'Process Records' dialog box with a close button (X) in the top right corner. The text inside reads: 'This will process the eligible records and place them in either a seated list or wait list.' At the bottom, the 'Process Records' button is highlighted with a red rectangular box, next to a 'Cancel' button.

# Process Records in School Choice Workspace

## 4. After processed **Check Results**, **Close**



# Process Records-Review Lottery Summary

## 5. Review Lottery

### Lottery Summary

This is a summary of the current state of school choice lottery assignments.

Total Available Seats: **218**  
Total Submissions Imported: **1**  
Total Students Seated: **2**  
Total Students Waitlisted: **0**  
Total Seat Assignments: **2**  
Total Waitlist Assignments: **0**

## 6. Navigate **Back to School Choice Workspace**

# Review Lottery Results-All Students

1. Navigate to **Students** > **All**

### Students

All (2) | Not Processed (0) | Processed (2)

2. Student View

Submission Workspace | School Choice Workspace

### Students

[← Back to School Choice Workspace](#)

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

Export Students | Print Seated Letters | Send Custom Email to Selected Students | Print Custom Letters for Selected Students

Custom Filter  Results Status  Seated Status  Page Size 50 | 2 Found | Page 1 of 1 |

	Application ID	FirstName	LastName	DateOfBirth	stu_ApplyGrade	EligibilityDeadlineStatus	SubmissionDate Time	Status	Seating Unit Choices	Seat Assignment(s)	Waitlist Assignment(s)	Re As
<input type="checkbox"/>	27081943	First1-21432265	Last1-21432265	09/10/2019	5		10/17/2018 09:28:33	Processed	Excel Achieve Inspire	Excel -> 5 (1)		
<input type="checkbox"/>	27081943	First2-21432265	Last2-21432265	09/10/2019	5		10/17/2018 09:28:33	Processed	Excel Achieve Inspire	Excel -> 5 (2)		



# Review Lottery Results-All Students

## 2. Student View

Submission Workspace

School Choice Workspace

Students

[← Back to School Choice Workspace](#)

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

[Export Students](#) | [Print Seated Letters](#) | [Send Custom Email to Selected Students](#) | [Print Custom Letters for Selected Students](#)

Custom Filter Results Status Seated Status

Page Size 

50

 | 2 Found | Page 1 of 1 |

	Application ID	FirstName	LastName	DateOfBirth	stu_ApplyGrade	EligibilityDeadlineStatus	SubmissionDate Time	Status	Seating Unit Choices	Seat Assignment(s)	Waitlist Assignment(s)	Re As
<input type="checkbox"/>	27081943	First1-21432265	Last1-21432265	09/10/2019	5		10/17/2018 09:28:33	Processed	Excel Achieve Inspire	Excel -> 5 (1)		
<input type="checkbox"/>	27081943	First2-21432265	Last2-21432265	09/10/2019	5		10/17/2018 09:28:33	Processed	Excel Achieve Inspire	Excel -> 5 (2)		

Obfuscated data

Seat assignments







# Review Lottery Results-All Students

## 2. Student View, continued

- Withdraw a student

					Find
	Seating Unit Choices	Seat Assignment(s)	Waitlist Assignment(s)	Removed List Assignment(s)	
d	Excel Achieve Inspire	Excel -> 5 (1)			
d	Excel Achieve Inspire	Excel -> 5 (2)			

Withdraw Student

# Review Lottery Results-All Students

## Page Features/Tasks

### Students

[← Back to School Choice Workspace](#)

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

[Export Students](#) | [Print Seated Letters](#) | [Send Custom Email to Selected Students](#) | [Print Custom Letters for Selected Students](#)

Custom Filter  ▼ Results Status  ▼ Seated Status  ▼ Page Size  ▼ | 2 Found | Page 1 of 1 |

# Review Lottery Results- By Seating Unit

## 1. Review School Results > Navigate to Next Level

School	
• Excel (50 Seats)   Seated (2)   Waitlist (0)	<a href="#">Next Level</a>
• Achieve (47 Seats)   Seated (0)   Waitlist (0)	<a href="#">Next Level</a>
• Inspire (33 Seats)   Seated (0)   Waitlist (0)	<a href="#">Next Level</a>
• Insure (40 Seats)   Seated (0)   Waitlist (0)	<a href="#">Next Level</a>
• College Prep (48 Seats)   Seated (0)   Waitlist (0)	<a href="#">Next Level</a>

# Review Lottery Results- By Seating Unit

## 2. Review Seated student by unit (grade)

Excel → Grade

Previous level

- K (25 Seats) | Seated (0) | Waitlist (0)
- 1 (5 Seats) | Seated (0) | Waitlist (0)
- 2 (5 Seats) | Seated (0) | Waitlist (0)
- 3 (5 Seats) | Seated (0) | Waitlist (0)
- 4 (5 Seats) | Seated (0) | Waitlist (0)
- 5 (5 Seats) | Seated (2) | Waitlist (0)

Previous level


## 3. Select Grade to view Seated, Waitlisted, or Removed Students

# Review Lottery Results- By Seating Unit

## 4. Review Results by Seating Unit-Make Waitlist or Remove Moves as required








Print Seated List | Print Waitlist | Download Seated List Report | Download Waitlist Report(s) | Send Custom Seated Emails | Print Se

Change Seating Cap

Seated List (2 Seated of 5 Available) for 5 | 

Accepted

Move to Waitlist

1.	27081943 First1-21432265 Last1-21432265, (09/10/2019)	Offered						1(5)
2.	27081943 First2-21432265 Last2-21432265, (09/10/2019)	Offered						1(5)

Obfuscated Data

Notification  
(Print seated  
letter)

Remove

Quick View

School  
Choice  
(Priority  
Tier)

# Communicate Lottery Results-By Seating Unit

## 2. Actions at top of page-For students on Current Page

[Submission Workspace](#) [School Choice Workspace](#)

**Excel → 5**  
[Back to School Choice Workspace](#)

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

[Print Seated List](#) | [Print Waitlist](#) | [Download Seated List Report](#) | [Download Waitlist Report\(s\)](#) | [Send Custom Seated Emails](#) | [Print Seated Letters](#) | [Print Custom Seated Letters](#) | [Send Custom Waitlist Emails](#) | [Print Custom Waitlist Letters](#)

**Seated List (1 Seated of 5 Available) for 5 |**

1. 27081943 First1-21432265 Last1-21432265, (09/10/2019) Accepted 1(5)

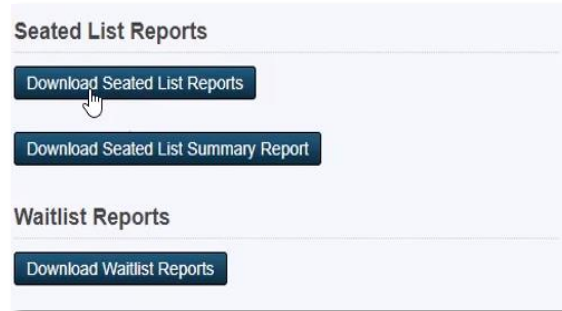
**Waitlist for 5 | [Change](#)**

WL1. 27081943 First2-21432265 Last2-21432265, (09/10/2019) 1(5)

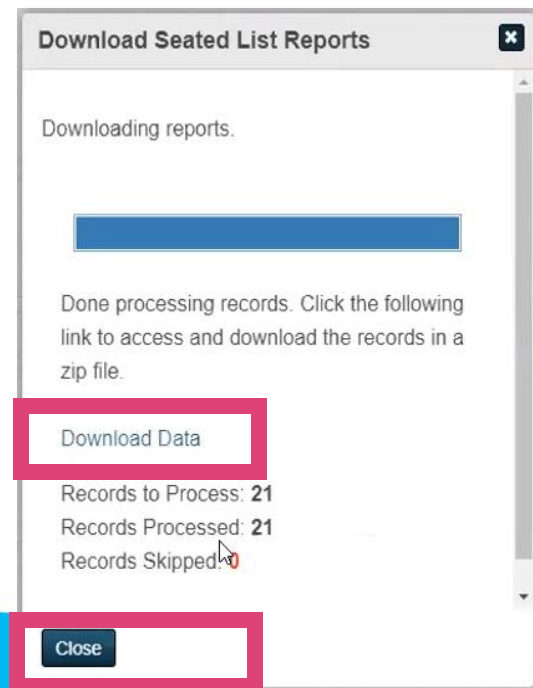
**Removed List for 5**  
No positions in the removed list have been assigned.

# Generate Reports

1. Select Report



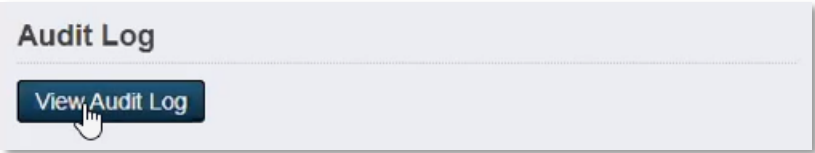
2. Download Data > Close





# Review Audit Log

- 1. In School Choice Workspace elect **View Audit Log**



- 2. Review Audit Log

Submission Workspace

School Choice Workspace

### Audit Log

Back to School Choice Workspace

TEST MODE - School choice features are currently operating in test mode. This means that all records and logging will be flagged as such and any results from testing are not valid for official use.

Find

Print | Export | Page Size 50

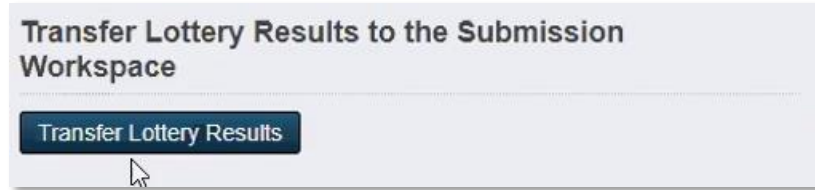
6 Found | Page 1 of 1

Timestamp	Account/Email	Mode	First	Middle	Last	DOB	Seating Unit	Description	Comment
2019-09-10 12:42:346	Chris Vonderhaar	TEST	First2-	Middle2-	Last2-	2019-09-10	Excel -> 5	Processed move of First2-21432265 Last2-21432265 to the	test
2019-09-10 12:37:55.110	Chris Vonderhaar	TEST	First2-21432265	Middle2-21432265	Last2-21432265	2019-09-10	Excel -> 5	Processed move of First2-21432265 Last2-21432265 from the seated list to the waitlist for seating unit '5'.	test
2019-09-10 12:33:08.224	Chris Vonderhaar	TEST	First1-21432265	Middle1-21432265	Last1-21432265	2019-09-10	Excel -> 5	Processed acceptance status change of First1-21432265 Last1-21432265 to Accepted for seating unit '5'.	Test
2019-09-10 12:12:03.513	Choice Tester	TEST						Choice Tester processed 2 records.	
2019-09-10 12:10:15.122	Choice Tester	TEST	First2-21432265	Middle2-21432265	Last2-21432265	2019-09-10		A student record was created for First2-21432265 Last2-21432265.	
2019-09-10 12:10:15.099	Choice Tester	TEST	First1-21432265	Middle1-21432265	Last1-21432265	2019-09-10		A student record was created for First1-21432265 Last1-21432265.	

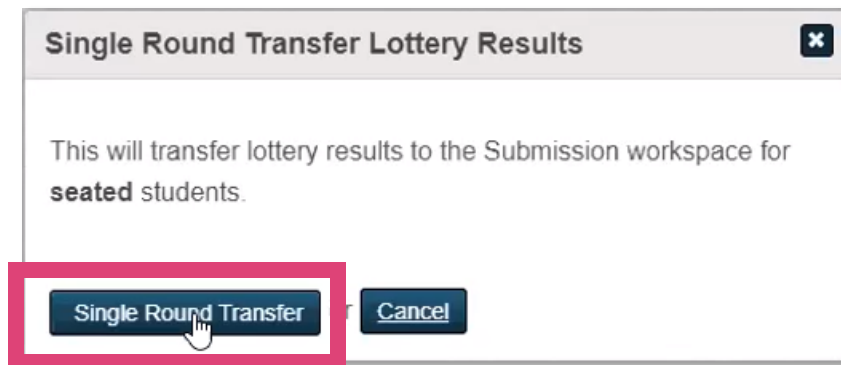


# Transfer Lottery Results

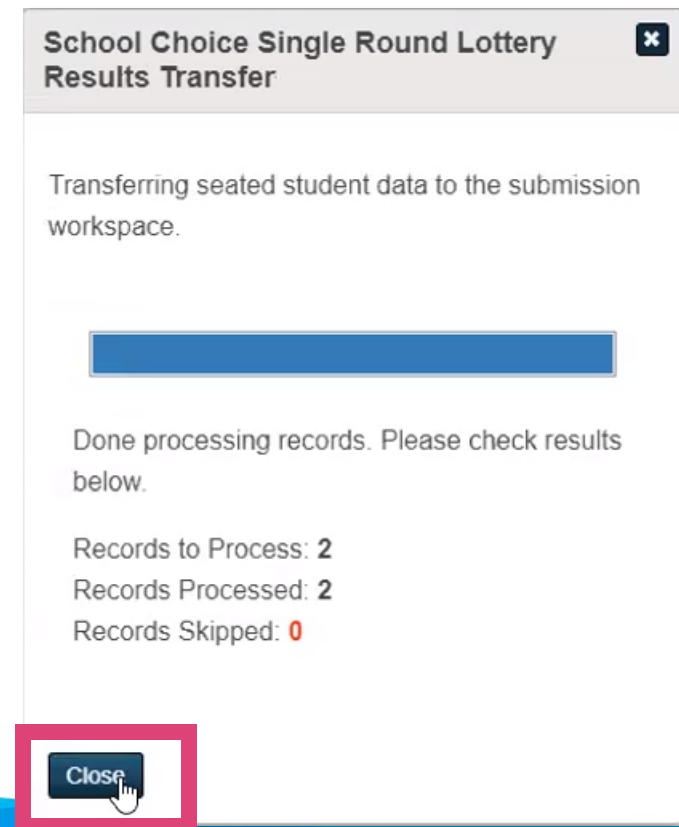
## 1. Select Transfer Lottery Results



## 2. Select Single Round Transfer

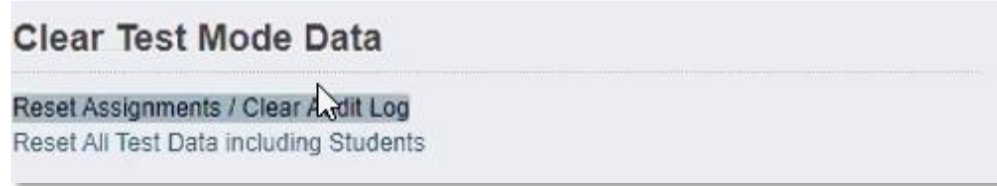


## 3. Close



# Next Steps

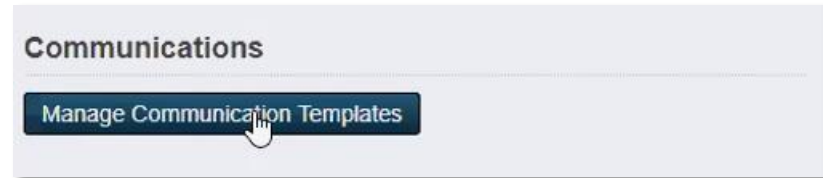
## 1. Clear Test Mode Data



## 2. Test, Test, and Test Again-Recommend Testing 5 times

## 3. Review

- Seating Units
- Grades
- Schools
- Communication Templates

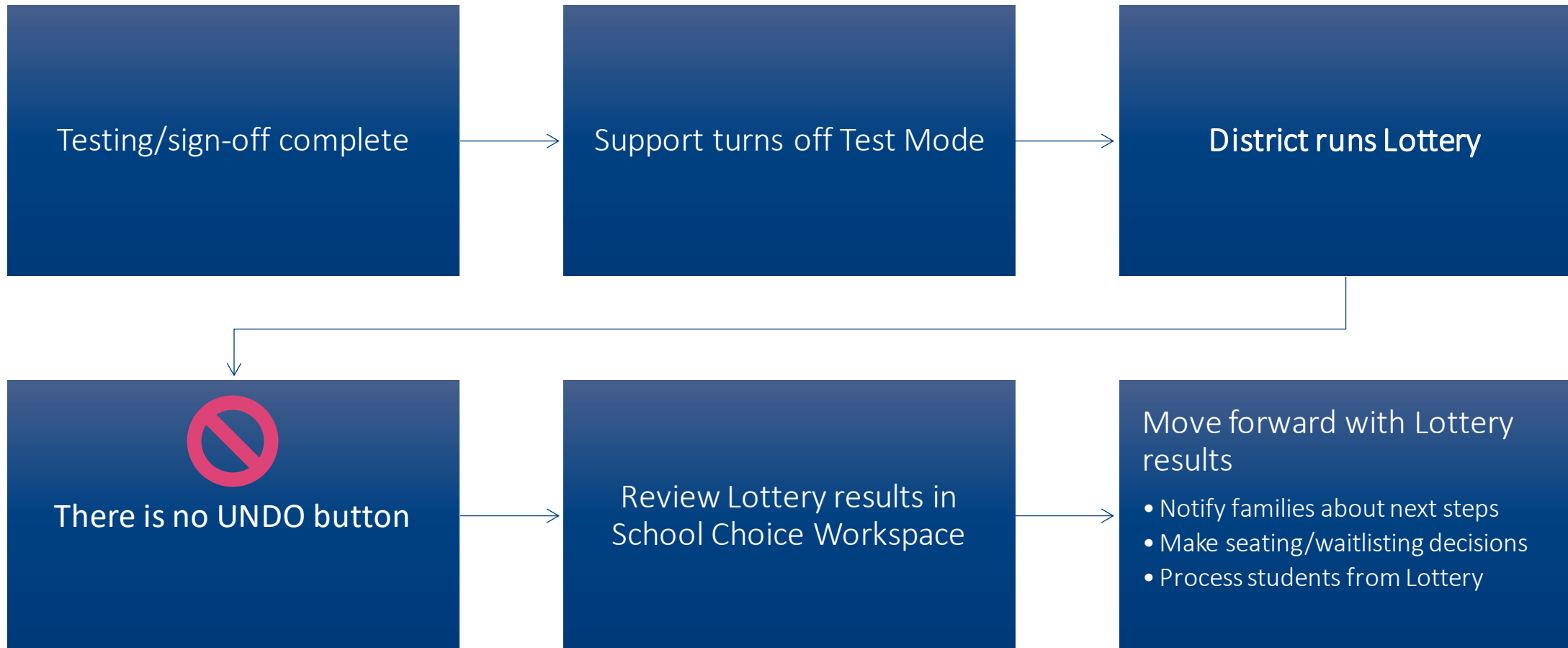


There is no UNDO button



# Running the Lottery

# Final Steps: Running the Lottery – *Working with PowerSchool Support*



# Questions

# Resources

- [School Choice Workspace](#) (Community Article)
- [School Choice Basics](#) – Record Approval (Community Article)
- [School Choice Basics – Lottery Communication](#) (Community Article)





# Upcoming Events

Enrollment Office Hours

Wednesdays @ 11am ET / 8am PT

<https://help.powerschool.com/t5/PowerSchool-Enrollment/Join-us-for-Enrollment-Office-Hours/ta-p/132352>







# Next Webinar

- **Oct 17th - Project Overview:** Join us to learn about the flow of a project from the kickoff call to connecting with support after the launch. We will also cover best practices when it comes to launching forms.

